



From Insight to Action: Defining Your Ideal Case and Positioning

HOW TO USE THIS WORKSHEET

This worksheet is designed to accompany the sections of the program focused on:

Clarifying Your Niche and Ideal Case and
Positioning and Professional Visibility

The most valuable part of any strategy is not just understanding the concepts, but applying them. This guided exercise is designed to help you move from insight to action by putting your ideas into clear, practical language.

As you work through the questions, you will begin to define:

- The types of cases you are best suited to handle
- The professionals most likely to refer those matters
- The value you bring that differentiates your practice

Set aside focused time to complete this exercise. Write your answers in plain, direct language. The goal is not perfection. The goal is clarity.

As you move through each section, keep this in mind:

Make it easy for the right people to know when to use you.

PART 1: DEFINE YOUR IDEAL CASE

1. What types of matters do you handle best?
(Consider both subject matter and case dynamics)

2. What makes these cases a strong fit for you?
(Skills, experience, temperament, background)

3. What types of cases do you NOT want more of?
(This is just as important as what you do want)

PART 2: IDENTIFY YOUR REFERRAL SOURCES

4. Who is most likely to send you these cases?

Type of attorney or professional:

Practice area:

Level of experience or client base:

5. Where do these professionals currently go for neutrals?

PART 3: CLARIFY YOUR VALUE

6. When do they need someone like you?
(What is happening in the case?)

7. What do you bring that makes you the right choice?

PART 4: BUILD YOUR POSITIONING STATEMENT

Draft your positioning statement:

I focus on:

Most of my referrals come from:

They come to me when:

What I bring is:

FINAL NOTE

This is not a one-time exercise. Your practice will evolve, and your positioning should evolve with it.

The goal is simple:

Clarity creates opportunity.
Positioning makes you memorable.
Consistency keeps you top of mind.

OPTIONAL: AI-ASSISTED EXERCISE

Use the following prompts with your preferred AI tool to deepen and refine your responses.

1. Clarify Your Niche

Act as a strategic advisor for a professional neutral building a mediation or ADR practice. Based on the following information, help me identify patterns in the types of cases I handle best and suggest a clear niche.

Here are the cases I've handled and enjoyed most:

[Insert]

Here are the cases I would prefer to avoid:

[Insert]

Identify 2–3 potential niche areas and explain why they are a strong fit.

2. Identify Referral Sources

Based on this niche: [insert niche], identify the most likely referral sources for these types of cases. Be specific about:

- Type of attorneys
- Practice areas
- Situations in which they would seek a neutral

Also explain what those referral sources value most in selecting a mediator or arbitrator.

3. Clarify Your Value

Help me articulate my value to referral sources in clear, practical language. Avoid generic phrases.

My background:

[Insert]

My strengths:

[Insert]

Describe:

1. When someone should use me
 2. What I bring to the process
 3. Why I would be chosen over another neutral
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4. Build Your Positioning Statement

Using the information below, draft 3 variations of a clear and concise positioning statement for my ADR practice. Avoid jargon and make it easy for referral sources to understand when to use me.

Niche:

[Insert]

Referral sources:

[Insert]

Value:

[Insert]

Each version should be no more than 3–4 sentences and written in plain, professional language.

5. Refine for Real-World Use

Review the following positioning statement and improve it for clarity, specificity, and impact. Make it more memorable and easier for referral sources to act on.

[Paste statement]

Also suggest one shorter version I can use in conversation.